

325 FW/JA
LAST WILL AND TESTAMENT QUESTIONNAIRE

PRIVACY ACT STATEMENT: Authority to obtain this information is 10 U.S.C. Sec. 8012 and E.O. 9397. Information will be used by office personnel to prepare your will. It will not be disseminated outside the legal office and is considered confidential. Disclosure is voluntary.

After completing this form, call 283-4681 to schedule an appointment with an attorney

FULL NAME:

_____ Male____/Female____
First Middle Name Last

STATE OF LEGAL RESIDENCE: _____

MILITARY STATUS: ____ Active Duty/ ____ Retired/ ____ Family Member

MARITAL STATUS:

____single ____married ____divorced ____pending divorce ____widow(er)

If married, spouse's full name:

Were you previously married? ____Y____N

CHILDREN: Use the following codes to indicate status of children:

N=natural; S=stepchild; A=adopted.

Do you wish to treat adopted/stepchildren the same as natural children? ____Y____N

<u>FULL NAME</u> (Including full middle name)	<u>Sex</u>	<u>Age</u>	<u>Status</u>
1. _____			
2. _____			
3. _____			
4. _____			

SPOUSE AND CHILD BENEFICIARIES:

If married, do you want all of your real estate and personal property to go to your spouse?
____ Yes ____ No

If you are not married **or** your spouse does not survive you, do you want all of your real estate and personal property to go to your children?
____ Yes ____ No

If any of your children do not survive you, do you want his or her potential share of your inheritance to pass to his or her children?
____ Yes ____ No

CONTINGENT BENEFICIARIES: If your spouse and/or your children die before you die, you are unmarried or have no children, or you want your property distributed in a way different from that described above, you may designate other or additional beneficiaries below:

<u>FULL NAME:</u> (First, Middle, Last)	<u>Relationship</u>	<u>City & State</u>	<u>Distribution</u> All or share (%)
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PRIMARY:*

1. _____
2. _____
3. _____

*If one of the primary beneficiaries dies, do you want to have his/her share distributed to the remaining primary beneficiaries? ____Y____N

<u>FULL NAME:</u> (First, Middle, Last)	<u>Relationship</u>	<u>City & State</u>	<u>Distribution</u> All or share (%)
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ALTERNATE:

1. _____
2. _____

OTHER PROPERTY: *

Do you wish to make a specific bequest of real property? ____Y____N (If yes, please bring the legal description to your appointment).

Do you wish to make a specific cash bequest? ____Y____N (If yes, please list:)

<u>Name</u>	<u>Relationship</u>	<u>City/State</u>	<u>Amount</u>
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*If your assets, including life insurance policies, total more than \$600,000, you may want to discuss estate-planning options with a civilian attorney who specializes in that field.

WRITTEN MEMORANDUM: If you are from AK, AZ, AL, CO, DL, FL, HI, ID, IA, KS, ME, MI, MO, MT, NE, ND, NJ, NM, SC, UT, VA, WA, or WY, you may attach a handwritten memorandum to your will leaving specific items of personal property to specified people. Personal property includes everything besides real property and money, i.e. cars, furniture, collections, antiques, clothing, etc.

Would you like a clause allowing you to do this? ____Y____N

PERSONAL REPRESENTATIVE: This person will carry out the directives in your will and work with your creditors after your death. (Note: Some states require your personal representative to be a resident of that state, unless they are a close relative. These states are: AL, FL, HI, IA, IN, KS, OH, TN, VA, WV).

Primary: _____

Full Name	City/State of Current Residence	Relationship
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Alternate: _____

Full Name	City/State of Current Residence	Relationship
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GUARDIAN: A guardian must be 18 years of age or older. (NOTE: Some states require guardians to live in that state, unless the named guardian is a close relative. These states are: AL, FL, GA, HI, IA, IN, KY, NV, OH, TN, WV).

Primary: _____
Full Name City/State of Current Residence Relationship

Alternate: _____
Full Name City/State of Current Residence Relationship

TRUSTEE:* If you have minor children who may receive property under your will, you can set up a trust in your will to place the property under the control of someone you trust until your children are mature enough to manage it themselves. However, this same effect may be gained by leaving the inheritance to your child(ren) under the Uniform Gifts to Minors Act. This is the recommended method of distribution, because it avoids the paperwork and expense involved in management of a trust.

Primary: _____
Full Name City/State of Current Residence Relationship

Alternate: _____
Full Name City/State of Current Residence Relationship

*Age property should be distributed to children: (If you choose an age greater than 21, you must create a formal trust.) _____

*If you have more than 1 child you may choose a single trust or multiple trusts:
_____Single _____Multiple

Comments/Questions
